

Behind Friendly Lines: Enforcing the Need for a Joint SOF Staff Officer

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THE EVENTS OF 11 September 2001 and the Global War on Terrorism (GWOT) have resulted in a significant expansion of U.S. Special Operations Command (SOCOM) and special operations forces (SOF) roles and missions. At the direction of Secretary of Defense Donald Rumsfeld, the Army has also placed SOCOM in the new and unfamiliar role of a supported combatant command.¹ The combination of expanded roles and missions with a higher demand for SOF assets and capabilities and increased command responsibilities poses a daunting challenge.

SOCOM's expanded roles and missions increase manpower requirements for SOF personnel who can plan at the strategic level.² As more SOF operators begin performing strategic planning duties, SOF units risk losing capabilities.³ Given SOF truths (people are more important than hardware, competent SOF cannot be created or mass-produced in an emergency, and quality over quantity), the expanded requirement for operators and planners presents a dilemma.⁴

How does SOCOM educate enough SOF planners for its expanded mission without compromising its capabilities or disregarding SOF truths? SOCOM cannot simply strip tactical SOF units, already critically short of experienced manpower, to meet the demand for educated strategic planners who can function effectively on a combatant commander's staff or on a joint special operations task force (JSOTF).

SOF field grade officers receive no formal education to prepare them for joint special operations (SO) at the operational level except that obtained in the intermediate service schools (ISSs). This lack of formal joint SO education limits these officers' ability to contribute and integrate SOF capabilities into joint staffs. The Army must address these limitations by introducing SOF officers to joint special operations early in their careers, either through for-

mal joint SO classroom instruction or distance learning, to prepare them for service with regional combatant commanders, theater special operations commands (TSOCs), joint task forces (JTF), JSOTF, or joint staffs. The SOF staff officer must be able to rapidly transition from SOF operator to effective JSOTF staff officer.

Defining the Problem

Joint doctrine is authoritative and followed except when, in the commander's judgment, exceptional circumstances dictate otherwise. After the 11 September 2001 terrorist attacks, operational planners at U.S. Central Command (CENTCOM) tasked Special Operations Command-Central (SOCCENT) to prosecute the opening phase of the campaign in Afghanistan against al-Qaeda and the Taliban. After an initial mission analysis, SOCCENT tasked the Middle East-oriented 5th Special Forces Group (SFG) to form a JSOTF, which eventually became known as Task Force (TF) Dagger.

Although the SOCCENT commander's decision appears to have been successful—with much pain and augmentation by Special Operations Command Joint Forces Command (SOCJFCOM) and other SOF units, the decision put the group commander in a role of JSOTF commander, a role for which his position was not doctrinally designed.⁵ Joint Publication (JP) 3-05.1, *Joint Tactics, Techniques, and Procedures for Joint Special Operations Task Force Operations*, states that “the core of the JSOTF staff is normally drawn from the theater SOC [Special Operations Command] staff or existing SOF component with augmentation from other service SOF.”⁶

The SOCCENT commander's decision to form the JSOTF with an existing service component impeded operations for the TF Dagger commander by placing him in the unenviable position of planning and

integrating major joint operational-level functions and tactical-level service tasks simultaneously. As one former SFG commander noted, this arrangement is the least preferred course of action because the commander does not have an organization of joint staff officers accustomed to working with the combatant commander's staff at the joint operational level.⁷

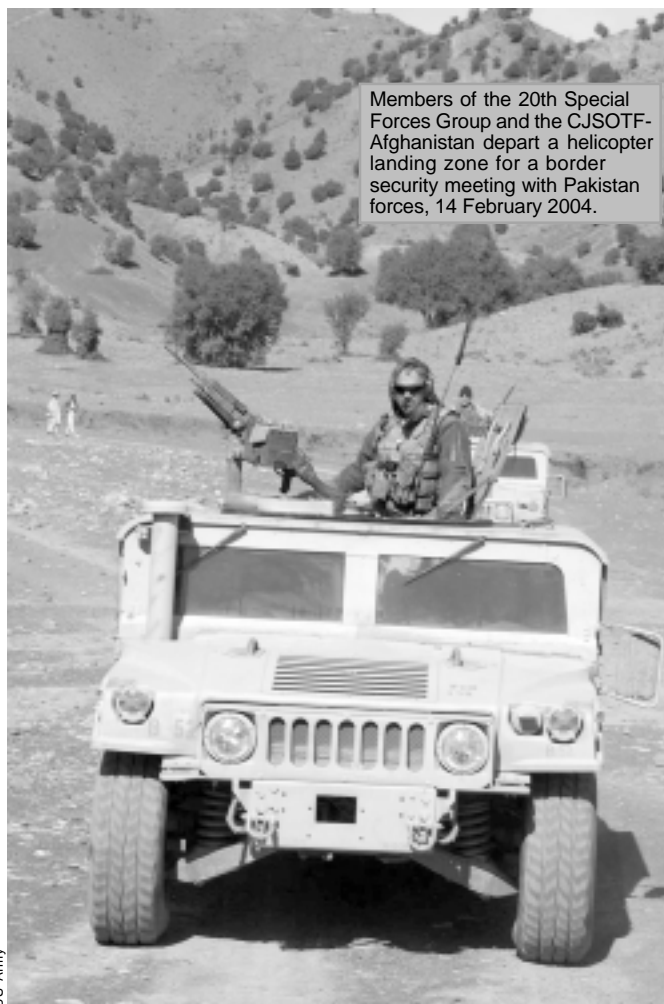
Doctrine for Army Special Forces (SF) and other SOF is nested in joint doctrine; however, the SFG headquarters is rarely, if ever, manned with joint-qualified staff officers. For example, during operations in Haiti in 1993, when the 3d SFG commander tried to form a temporary JSOTF, he discovered that there were no joint-qualified officers in his headquarters to fill essential positions, thus hindering initial startup. The 3d SFG commander later said, "We thought we could do it all, but found that we could not."⁸

Most SFG or Naval Special Warfare Group staff functions are performed by newly promoted field grade officers with minimal or no joint experience. Some are recent ISS graduates and might have served temporary duty as a company grade officer with a joint headquarters during a previous deployment. Fewer still have attended the Joint Special Operations University (JSOU) or participated in JSOTF training exercises hosted by SOCJFCOM. So, what can SOF commanders do to enhance their assigned field grade officers' knowledge of joint operations? The answer is joint SOF education and training.

One senior SOF officer with several previous joint tours noted, "Joint tactics, techniques, and procedures must be learned (education) and practiced (training). Learning can conceivably be done in the service schools; practice must be done in joint training exercises, experimentation, testing, and finally operations."⁹

SOF Individual Training Requirements

According to JP 3-05, *Doctrine for Joint Special Operations*, "SOF require a combination of basic military training and specialized skill training to achieve operational proficiency. SOF-specific training includes both individual skill training and extensive unit training to ensure maximum readiness."¹⁰ *United States Code*, Title 10, Section 167, "Definitions," charges the SOCOM commander with the



Members of the 20th Special Forces Group and the CJSOTF-Afghanistan depart a helicopter landing zone for a border security meeting with Pakistan forces, 14 February 2004.

U.S. Army

training of all special operations forces.¹¹ This training should include interoperability with conventional and other SOF forces, particularly individual SO training, and professional military education. Joint training of SOF is shared with the regional combatant commanders who, through their TSOC, articulate SOF mission-essential tasks supporting theater campaign and security cooperation planning.¹² The sooner SOF officers are educated and trained at the operational and strategic levels of joint operations, the better prepared they will be when they are assigned to a TSOC or other joint staff responsible for SOF integration.

Because SOF can deploy unilaterally or in support of a conventional force at all spectrums of conflict, they must retain the company-level skills they developed before moving into special operations. Not only must company grade officers know SOF mission-essential tasks, they must continue to hone skills for integration into conventional force operations in support of theater objectives.¹³

In August 2002, the Army War College invited 51 representatives from Army major commands, the Army Staff, the Center for Lessons Learned, the Center for Military History, RAND, and other government agencies to discuss their initial impressions of GWOT and to capture lessons learned. One key lesson learned was that “better SOF-conventional integration and more joint training must be executed to husband Army SOF for the many essential missions they will perform in the ongoing war against terrorism.”¹⁴

According to SOCOM Publication 1, *Special Operations in Peace and War*, “Training and education are the twin pillars of special operations professional development. Training is designed to produce individuals and units that have mastered the tactics, techniques, and procedures through which units accomplish their missions. Through education, individuals learn the art and science of war and peacetime operations and develop military judgment necessary to apply initiative and creativity to the solution of problems and challenges.”¹⁵ The focus must be at the operational-strategic level of warfighting in a joint environment. SOF can apply these skill sets directly to campaign planning for the GWOT.

SOF personnel must complement their formal training with education. SOCOM Directive 621-1, “Joint Special Operations Education System,” outlines specific education goals and requirements.¹⁶ As part of the education process, SOF personnel usually attend a host of joint and service courses such as ISS. Selected SOF officers may attend an advanced military studies program such as the Army School of Advanced Military Studies, the Marine Corps School of Advanced Warfighting, or the Air Force School of Advanced Air and Space Studies. Others may choose to attend joint SOF education courses offered at JSOU at Hurlburt Field, Florida. However, this is about as far as the formal military school system can educate SOF officers. Even SOCOM Publication 1 acknowledges, “The majority of a serious professional development program must be self-development.”¹⁷ This approach leaves it up to the individual SOF officer to obtain follow-on and advanced education and training. With the current focus on SOCOM expansion, it is time to change the practice of self-development to require SOF officers receive focused education and training in critical joint warfighting skill sets derived from recent GWOT experiences.

Operations in Afghanistan have yielded some noteworthy issues that the Army should address in formal SOF education and training. Although not all-

inclusive, the following areas need greater emphasis in SOF education and training:

- Joint fire measures and integration and deconfliction of air and battle space.
- Special activities and compartmented operations.
- Information management and technologies.
- Joint SO doctrine and linkages to the theater campaign plans.
- JSOTF manning requirements, particularly reserve forces.
- Joint operations and planning.
- Full-spectrum and unconventional approaches to operations ranging from small-scale contingencies to high-intensity conflict.
- Synchronization of joint operations to achieve synergistic effects with sister service capabilities.
- SOF and conventional force interoperability.

Joint SOF Officer Skill Sets

Joint fires and battlespace deconfliction have significant effects on SOF planning and employment. Special operations forces have become proficient in the use of tactical fires at the training centers such as the joint readiness training center (JRTC) and the national training center (NTC). Before operations in Afghanistan, most SOF only incorporated organic service fires (organic attack aviation or artillery platforms). Several scenarios at the training centers employ time-sensitive targets and bombers performing close air support. However, these scenarios do not train SOF staffs or JSOTF commanders inexperienced in the joint fires process and battlespace synchronization.

In some cases, JRTC and NTC training creates false expectations about SOF doctrine and employment.¹⁸ Initial analysis from Afghanistan indicates that air power, coordinated with SOF and indigenous maneuver forces, “was a joint air-land struggle in which the ability to combine fire and maneuver by diverse arms made the difference between success and failure.”¹⁹ Although combining fire and maneuver by diverse arms might seem new, SOF have employed it before; the current SOF generation has only relearned it. Air power plays an important role in support of SOF assets. The flexibility of air power, particularly from aircraft carriers, can quickly provide SOF with operational fires, as in Afghanistan. The strategic bomber has emerged as one of the preeminent weapons systems in support of SOF. B-52s and B-1s have the advantages of long loiter time; all-weather operations; reduced short-range, foreign-basing requirements; large numbers of near-

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The JSOTF-Philippines commander and public affairs officer, brief reporters from the BBC, Zamboanga, Republic of the Philippines.

precision guided weapons; and large crews able to man a number of communications radios. The joint SOF operator and planner will achieve success if he understands the capabilities joint assets can bring to the fight. In the GWOT, Navy and Air Force assets provide the most responsive joint fire support for SOF.

The special operations liaison element (SOLE) is critical to accessing joint fires and deconflicting battlespace. The SOLE integrates all SOF air and surface operations in the combined air operations center and is responsible for carrying out the JSOTF commander's intent through liaison with the joint forces air component commander's (JFACC) combat plans division (CPD). Efforts to enhance SOLE integration must continue through research that airmen and SOF conduct in their ISS education and in training of JSOTF staffs. Experimentation with agencies such as the Combined Air Operations Center-Experimental at Air Combat Command is also important.

Future JSOTF commanders might request an air support operations center (ASOC). The ASOC is a JFACC asset normally attached to an Army corps headquarters operating as a JTF. Joint Publication 3-05 states, "ASOCs can help the SOF commander request and integrate air power into all the JFC's [joint force commander's] special operations."²⁰

The modern JSOTF can be employed as a stand-alone with a joint interagency task force (JIATF), or as part of a JTF. The JSOTF becomes the interface between conventional and unconventional compartmentalized operations. Although operational security (OPSEC) is paramount to successful special operations, in the recent campaign in Afghanistan, SOF staff officers hampered logistical support to the Northern Alliance and coordination of some critical air support by creating informational stovepipes. SOF staff officers must ensure that their key theater counterparts, on whom they rely on for air support, logistics, and intelligence, are "read-in" so these counterparts can plan and allocate available theater support. Joint SOF officers must continually identify who must participate in planning at the theater level and assess the effect of OPSEC in accomplishing the overall campaign plan.

Advanced SOF education and training must include information management and technologies that can help streamline planning processes through collaboration tools that create a dynamic, interactive interface between a JTF and a JSOTF and its components.²¹ Because of the ad hoc nature of today's JSOTF, gaps exist in "national-level intelligence support, operators for systems which provide the common operational picture, and sufficient personnel to sustain combat operations in the future operations



U.S. and British members of the JSOTF-North in Iraq plot their course while flying on an MH-53M PaveLOW.

and plans cell of a JSOTF.”²² One recent study of the technological GWOT challenges stated that another priority must be “integration of SOF and the leveraging of multilateral capabilities more seamlessly with conventional forces operations.”²³

The recent joint experiment Millennium Challenge-02 (MC-02) debuted a number of collaborative tools for future JTF and JSOTF headquarters. As technology increases, these tools will become more efficient and have greater capability. Proficiency in these techniques and technologies is perishable, however, and reliance on technology alone without a system of back ups could result in the techniques and technologies becoming a millstone to the JSOTF if they falter or are disrupted.

At the start of MC-02, selected personnel had up to three training periods on systems and procedures. The demands of an information-based JSOTF (telephone, e-mail, net-chat, radio, television, video teleconferences, web pages, and on-line collaboration) overwhelmed soldiers with little or no training. SOF must take advantage of advances in information management and technologies to remain relevant.

For SOF to synchronize with conventional forces, they must understand sister service and joint doctrine to comprehend the idiomatic expressions sister services use. Unfortunately, military culture dis-

counts doctrine more than it adheres to it. After every major conflict, SOF seem to reinvent the wheel, and the GWOT is proving no different. Because SOF tend to slight doctrine and education, they “lack the training, equipment and manning to rapidly and effectively establish what are now ad-hoc headquarters at the joint operational level.”²⁴ SOF sacrifices time and energy because they do not know the doctrine well enough and need more warrior-scholars with the skills necessary to serve at all operational levels. SOF personnel must know national security master strategies to combat terrorism, understand SOF capabilities, and build a SOF strategy to prosecute the GWOT.

Experience demonstrates that establishing a JSOTF is easy, but manning it with qualified joint personnel is difficult. Because JSOTFs are not likely to become less complex, SOF must better educate and train officers, especially communications, intelligence, and support field grade officers, finding ways to track and recall officers with expertise in joint SOF operations as they rotate from SOF to conventional units.

U.S. Army Reserve (USAR) and National Guard (ARNG) SOF roles and the roles of conventional personnel supporting SOF are also crucial. Before conducting JSOTF operations in Afghanistan, the 20th SFG (ARNG) conducted several train-ups and participated with SOCJFCOM in MC-02, which provided an excellent shakedown before deployment. Manning with properly educated and trained teams is crucial.

Recommendations

No simple, one-size-fits-all solution exists to create better educated, trained, and joint-qualified SOF officers at the operational level. SOCOM must have creativity, perseverance, and a long-term, broad strategy. A recent Government Accounting Office (GAO) survey acknowledged that to develop an effective strategic plan the Department of Defense (DOD) needed “greater flexibility and that leveraging new educational technologies would facilitate its ability to prepare officers for the joint environment.”²⁵ Two agencies address this education and training requirement: the JSOU and the SOCJFCOM.

In the near term, SOCOM must leverage the capabilities of both the JSOU and the SOCJFCOM. SOCOM assigns officers with the right operational and educational backgrounds and clearly delineates lines of operations. SOCOM must ensure unity of effort to make joint SOF education and training more effective and provide the necessary funding for education and training resources. Joint Publication 3-05.1 and SOCOM Directive 621-1 contain education and

training guidance.²⁶ In accordance with JP 3-05.1, the USSOCOM commander has designated SOCJFCOM to conduct training of selected JSOTFs and to assess SOF-related doctrine in support of SOCOM's collective training program.²⁷

There are three training levels. The first includes all staff officers, NCOs, and personnel, including AC and RC augmentees who might serve on a JSOFT headquarters or who are being assigned to a theater SOC. Training might be conducted via a compact disk for individual self-paced training. The JSOU would be responsible for maintaining and updating JSOTF training. Level-two training, which would include the theater SOC commander, potential theater SOC commanders, and selected SOC or JSOTF personnel, would be conducted in a formal classroom environment at the Joint Special Operations University. Level-three training would include staff officers, NCOs, and personnel assigned to or supporting a theater SOC or JSOTF headquarters in support of a JTF or higher joint force. USSOCOM-sponsored SOF training teams would conduct level-three training.

Both JSOU and SOCJFCOM are responsible for this effort, and SOCOM is the executive agent charged with ensuring that all education and training complies with established policy and standards. SOCJFCOM must evaluate the execution of SOF-related joint doctrine in support of SOCOM's collective-training program through the JFCOM's joint training infrastructure.

Educating SOF in joint operations is also partly a matter of timing. The more senior an officer becomes, the greater the requirement is for joint education and training. JSOU research facilities and teaching focus on educating SOF leaders, giving SOCOM an unparalleled opportunity to meet education requirements for 21st-century SOF personnel. SOCOM must target ISS collectively with JSOU's education mission and SOCJFCOM's experienced trainers to build the necessary core of joint SOF officers.

Special Forces Qualification Course attendees and other SOF personnel in initial entry-training should receive a joint SO doctrine and procedures overview—not to make them doctrinal experts, but to address jointness early in their careers. By the seventh or eighth year of service, most officers no longer command SOF detachments or platoons, but normally occupy assistant staff positions. The time to expose them to joint SOF doctrine in preparation for ISS and field grade officer responsibilities is when they become staff officers.

The proposed model is similar to one originally established in 1989, with a few modifications to account for updated doctrine.²⁸ The focus must be on

educating SOF personnel for the joint operational level. Integration of SOF joint operations, such as in the Special Forces Qualification Course, should fall under the JSOU's direction and be taught in residence or by mobile education teams (METs) traveling to outlying SOF duty stations. Some selected instruction might occur by CD-ROM or interactive web-based learning.²⁹

Joint SOF education should also be injected into the ISS. About 75 percent of all SOF ISS students attend the Army Command and General Staff College each year where an established SOF track includes over 200 hours of instruction supported by JSOU in both core- and graduate-level tasks in four areas: civil affairs, psychological operations, special operations, and special operations aviation. JSOU must also offer joint SOF instruction at the Navy, Marine Corps, and Air Force (USAF) ISS and through their respective Advanced Military Studies (AMS) programs. According to one SOF officer responsible for ISS education, placing a larger number of SOF officers in the AMS programs is a priority, along with follow-on placement of them in areas where they can make the greatest contributions to SOF and the joint community. In addition, programs must continue to be developed for officers selected to fill joint billets but not selected to attend a resident ISS.

According to DOD data, one-third of officers serving in joint positions in fiscal year 2001 participated in both phases of the joint education program.³⁰ A recent GAO report notes, "The Joint Forces Staff College, from which most officers receive the second phase, is currently operating at 83 percent of its 906-seat capacity."³¹ One possible solution to achieving higher attendance is to have SOF personnel attend ISS, go on temporary duty enroute to the Joint Forces Staff College (JFSC) and then report to their units. This would put more SOF Joint Professional Military Education—Phase II (JPME-II) graduates into units but would require a flexible personnel system. Having a JPME-II-qualified officer in SOF tactical units, headquarters, or joint staffs would be valuable to operations and planning teams and a great investment in and benefit to SOF and conventional forces. These are near-term solutions, but developing a long-term plan is crucial, too. Focused joint education and training for SOF officers is essential for operational success in joint or JSOTF environments.

Does SOCOM need to have a separate ISS? One senior SOF officer pointed out that in the 1930s airmen worked through the theory and mechanics of air-power application at the Air Corps Tactical School (ACTS) at Maxwell Field, Alabama. Because of their efforts, when World War II began,

their theories and experiments eventually gave birth to a new military service—the USAF. This change came about because the Army could not provide the education, training, and resources airmen required.

Obviously, SOCOM is far from establishing its own ISS or a separate SOF service. However, the National Security Strategy and National Strategy for Combating Terrorism rely on preemptive actions and expanding SOF roles, thus it would be premature to rule out such a possibility in the coming decade.

With SOCOM's and SOF's GWOT missions and the requirement to conduct operations in a joint environment, junior field grade SOF operators and planners must obtain quality educations and training for the operational and strategic levels of joint operations in order to function effectively on a combatant commander's staff or on a JSOTF. Joint SOF staff officer training should focus on, but not be limited to, the following skill sets:

- Joint operations and planning.
- Full-spectrum operations.
- Synchronization of joint operations.
- Familiarity with all service components' doctrine and capabilities.

trine and capabilities.

- Joint fires employment.
- SOF and conventional force interoperability.
- Joint force air component commander and air targets officer coordination.

An ideal place to conduct this standardized joint training would be at each service's ISS as part of SOF officers' required curriculum. If this is not feasible, the JSOU and SOCJFCOM in residence or in mobile education and training teams could conduct education and training. SOCOM, with JSOU and SOCJFCOM, must be the lead headquarters to ensure unity of effort and standardization.

In October 1995, U.S. Army Major General Sidney Shachnow stated, "Undoubtedly, some people will point to the magnificent manner in which SOF [has] succeeded in meeting all challenges to date. These same people will remind us not to fix something that is not broken. My response is [as Thomas Edison said]: 'Show me a thoroughly satisfied man, and I will show you a failure.' Of all our human resources, the most precious is the desire to improve."³² **MR**

NOTES

1. Rowan Scarborough, "Rumsfeld Bolsters Special Forces," *Washington Times*, 6 January 2003, 1.
2. Glenn W. Goodman, "Expanded Role for Elite Commandos," *Armed Forces Journal International* (February 2003): 36.
3. Experienced SOF commanders are hesitant to expand higher headquarters unless doing so would benefit SOF missions in the field. Otherwise, expanding headquarters is seen as bureaucratic and wasteful of critical manpower assets.
4. U.S. Chiefs of Staff Joint Publication (JP) 3-05, *Doctrine for Joint Special Operations* (Washington, DC: U.S. Government Printing Office [GPO], 17 April 1998).
5. For more information concerning the pros and cons of establishing a JSOTF, refer to "Special Operations Forces Joint Training Team," *Joint Special Operations Insights* (June 2002).
6. JP 3-05.1, *Joint Tactics, Techniques, and Procedures for Joint Special Operations Task Force Operations* (Washington DC: GPO, 19 December 2001).
7. COL Ed Phillips, E-mail message to authors, 6 February 2003.
8. COL Mark Boyatt, "Haiti—Unconventional Operations," command briefing, Fort Bragg, NC, October 1994, videocassette.
9. Greg Jannarone, E-mail to authors, 10 January 2003.
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11. USC, Title 10, *Armed Forces*, Section 167, "Unified Combatant Command For Special Operations Forces." See on-line at <www4.law.cornell.edu/uscode/10/167.html>, accessed 20 April 2004.
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14. Center for Strategic Leadership, *The U.S. Army's Initial Impressions of Operation Enduring Freedom and Noble Eagle* (Carlisle, PA: Army War College), October 2002.
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16. SOCOM Directive 621-1, "Joint Special Operations Education System," 9 March 2001, 5.
17. SOCOM Publication 1, C-6.

18. Thomas P. Odom, "SOF Integration: A JRTC Tradition," Center for Army Lessons Learned, JRTC-CALL Cell, 4th Quarter, 2002, on-line at <https://call2.army.mil/call/products/trngqtr/tq4-02/odom.asp>, accessed 29 April 2004.
19. Steven Biddle, *Afghanistan and the Future of Warfare: Implications for Army and Defense Policy* (Carlisle, PA: Strategic Studies Institute, U.S. Army War College, November 2002) and Don D. Chipman, "Airpower and the Battle for Mazar-e Sharif," *Air Power History* (Spring 2003): 34-45.
20. JP 3-05.
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22. LTC Wes Rehorn, interview with authors, 12 February 2003.
23. Center for Strategic Leadership.
24. Rehorn.
25. General Accounting Office (GAO) 03-238, Report to the Subcommittee on Military Personnel, Committee on Armed Services, House of Representatives, "Military Personnel: Joint Officer Development Has Improved, but a Strategic Approach is Needed" (Washington, DC: GPO, December 2002), on-line at <www.gao.gov/new.items/d03238.pdf>, accessed 29 April 2004.
26. JP 3-05.1 and SOCOM Directive 621-1.
27. JP 3-05.1.
28. This model is an updated version of an original program of instruction, which was proposed in 1989. See "Fighters vs. Thinkers: The Special Operations Staff Officer Course and the Future of SOF," *Special Warfare* (Spring 1989): 33-37.
29. One recent RAND report notes that distance learning supports asynchronous learning (that is, learning whenever an individual chooses to) and allows learning programs to be redesigned and offered as modular units, thus tailoring the material to current skill levels, new assignments, and time constraints of individual soldiers. Also, distance learning can more easily provide refresher training and just-in-time training, allowing soldiers to remain proficient in a wider range of skills or to have proficiency restored when and where needed. See "Army Distance Learning Can Enhance Personnel Readiness," RAND, on-line at <www.rand.org/publications/RB/RB3028>, accessed 8 April 2004.
30. GAO-03-238.
31. Ibid.
32. MG Sidney Shachnow, quoted in *Special Warfare* (October 1995).

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